

# STATE OF INDIANA

DEPARTMENT OF LOCAL GOVERNMENT FINANCE



INDIANA GOVERNMENT CENTER NORTH  
100 NORTH SENATE AVENUE N1058(B)  
INDIANAPOLIS, IN 46204  
PHONE (317) 232-3777  
FAX (317) 974-1629

## 2015 Budget School Information for Review Purposes

Please mail this completed form and the requested information to your Field Representative within two days after the adoption meeting.

School Name:	_____	County:	_____
Contact Person:	_____	Title:	_____
Telephone:	_____	Fax:	_____
Mailing Address:	_____	Email:	_____
	_____		_____
	_____		_____

- I. **Excessive levy appeal** for increased transportation costs– must be filed directly with the Indianapolis office of the Department of Local Government Finance. Last date to file is Oct. 20, 2014.
- II. **Budget Forms – Must be submitted via Gateway for 2014 pay 2015**
- ☐ Prescribed Budget Forms 1, 2, and 4B for each fund, plus forms 3, 4, and 4A
  - ☐ Current Year Financial Worksheet (formerly line 2 Worksheet)
    - \_\_\_ include a copy of any appropriation reduction resolution, if applicable
  - ☐ Debt Service Worksheet(s)
  - ☐ Proofs of Publication
    - \_\_\_ Budget Hearing/Adoption
    - \_\_\_ CPF Hearing (if published separate)
    - \_\_\_ CPF Notice of Adoption
    - \_\_\_ Bus Replacement Plan Hearing (if published separate)

### **Forms – Need to be submitted via U.S. mail**

- ☐ Encumbrance information from 2013 (re: part of Form 9 for July – Dec. 2013)
- ☐ DOE Form 9 for July – Dec 2013
- ☐ DOE Form 9 for Jan – June 2014

### **Additional information required to be mailed**

- ☐ 2015 CPF Plan, which shall include
  - \_\_\_ Summary page for the CPF Plan
  - \_\_\_ Notice of Adoption (originals)
  - \_\_\_ Resolution adopting the Plan
  - \_\_\_ Certificate of No Remonstrance from County Auditor
- ☐ 2015 Bus Replacement Plan
  - \_\_\_ Enclose all sections (1, 2,& 3 of the Plan)
  - \_\_\_ Resolution adopting the Plan
- ☐ Amortization and/or lease rental schedules, plus lease rental affidavits
- ☐ Actual temporary loan interest for the last half of the current year
- ☐ Unreimbursed textbooks amount with supplemental report if higher than certified by DOE

- III. Neutrality resolution for Pension debt, if applicable
- IV. Neutrality resolution exercising the option for reduced pension debt neutrality for 2015
- VI. Copy of School Board Resolution requesting fixed rate, cap, levy, combination fixed rate, etc. (if applicable)
- VII. If you expect CPF budget cuts, please submit a priority cut list
- VIII. If you have new debt, please include newspaper affidavit of Notice/Intent to Incur Debt, Resolution to Incur Debt and Final Amortization Schedule. These can be uploaded directly into the Debt Management application of Gateway
- IX. Statement of proposed levies and rates submitted to the county auditor no later than September 1.
- X. Other information the Department needs to prepare preliminary budget (ie: Debt restructuring, Petition for an adjustment to the Bus Replacement levy, etc)
- XI. Approving Order from the Department for circuit breaker re-allocation (if applicable) plus worksheets detailing re-allocation, transfers needed and line 7 calculations.
- XII. Approving Order from the Department for exemption from protected taxes (if applicable) plus worksheets detailing transfers needed and line 7 calculations.